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Foreign CROPS AND MARKETS



VOLUME 58

NUMBER 25

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FOR RELEASE

MONDAY

JUNE 20, 1949

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

L A T E N E W S

The United Kingdom will buy 1,300 tons of Canadian raspberries, according to a late airgram. The Canadian Government bought the fruit from British Columbia growers as a price support measure with a total value of around \$300,000.

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Egypt's final official cotton report placed the 1948-49 crop at 8,899,732 cantars (30,000 bales) of unclassified cotton and linters. This is higher than the last previous estimate of 1,772,000 bales and the 1947-48 crop of 1,314,000 bales.

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Silk production in Italy amounted to only 9,518,000 kilograms (20,983,000 pounds) of cocoons in 1948, the lowest in 50 years. Current prospects for 1949 are only slightly better on the basis of the number of silkworms being raised. The supply of mulberry leaves is more than adequate.

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FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free to those needing the information it contains for dissemination and other related activities. Issued by the Office of Foreign Agricultural Relations of the U.S. Department of Agriculture, Washington 25, D.C.

WORLD WOOL PRODUCTION SHOWS SLIGHT INCREASE

World wool production in 1949 ^{1/} is estimated at 3.7 billion pounds, an increase of 10 million pounds over a year earlier, according to information available to the Office of Foreign Agricultural Relations. The estimate is approximately 5 percent below the 1936-40 average of 3.9 billion pounds.

The strong demand for wool and the resulting high prices on the world market for the past several years have provided producers with the incentive either to increase or to maintain wool production in all of the major producing countries except the United States.

Favorable wool prices, which were expected to encourage a larger production in 1948, were partially offset by unfavorable weather conditions in a few important countries and by competition with other farm enterprises in other countries. The sheep-raising and wool-producing industry is readily affected by weather conditions, and less quickly by economic influences.

A larger wool production in 1949 is indicated for South America, Africa, Oceania (Australia and New Zealand) and the Soviet Union, than a year ago. Also, the output in South America, Oceania and the Soviet Union is considerably above the 1936-40 average, while Africa is still about one-third below. Generally, pasture and feed conditions for sheep-raising and wool-production have been favorable during the past year, except in a few provinces of Argentina, Union of South Africa, and a portion of Australia. On the other hand, North American production estimates indicate the continuance of the downward trend and estimates for Europe and Asia are also somewhat below last year. Production in these areas is 37 percent, 20 percent and 4 percent, respectively, below the 1936-40 average. The lower production reflects primarily the smaller number of sheep in those continents.

Production of wool in Canada and the United States in 1949 probably will continue the downward trend which has been in effect for the past several years. Both countries are practically one-third below their respective prewar levels. With other countries in North America producing about the same as last year, the total 1949 wool production for the continent is estimated at only 286 million pounds, about 165 million pounds below the 1936-40 prewar average.

In Europe, wool production for the current year showed a decline from a year earlier. Production, however, was maintained in most countries and increased in some. The output in Spain, one of the principal producing countries, may fall from 88 to 66 million pounds as a result of the severe drought in the latter part of 1948 and early 1949. The

^{1/} Based upon estimates of the clip now being shorn in the Northern Hemisphere and a forward estimate to the Southern Hemisphere clip for the season beginning in September and October, including both apparel and carpet wool.

WOOL: Production in specified countries, greasy basis
averages 1931-35 and 1936-40, annual 1944 to 1949 1/2

Continent and country	Averages		1944	1945	1946	1947	1948 1/2	1949 1/2
	1931-35	1936-40						
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA								
Canada.....	17.3	15.6	19.3	19.6	17.1	14.1	11.9	10.0
United States								
Shorn.....	366.3	360.6	378.3	307.9	280.4	252.8	233.9	-
Pulled.....	64.8	64.7	73.5	70.5	61.3	56.6	46.6	-
Total.....	431.1	425.3	451.8	378.4	341.7	309.4	280.5	265.0
Estimated total 3/.....	458.2	451.7	442.2	409.2	370.0	334.7	303.6	286.2
EUROPE								
Austria.....	1.2	1.3	2.0	2.0	1.7	1.8	2.0	-
Bulgaria.....	26.8	26.7	23.4	19.3	14	25.7	28.6	30.0
Eire.....	18.4	17.2	15.9	16.1	14.5	13.0	12.0	11.0
Estonia.....	1.9	-	-	-	-	-	-	-
Finland.....	2.3	2.7	2.2	2.2	2.6	2.4	2.4	2.4
France 5/.....	36.9	37.1	26.0	25.0	26.5	28.6	29.3	30.0
Germany 6/.....	-	31.7	37.0	34.0	25.7	25.4	26.8	27.8
Greece.....	17.7	19.3	9.3	11.2	14.5	16.9	16.4	16.2
Hungary.....	11.4	12.9	8.2	2.3	3.3	4.0	5.0	5.5
Italy.....	31.0	30.4	23.4	23.8	24.7	27.0	28.0	29.0
Latvia.....	4.2	-	-	-	-	-	-	-
Lithuania.....	3.7	-	-	-	-	-	-	-
Netherlands.....	2.9	3.1	2.4	2.4	2.7	2.3	2.2	2.0
Norway.....	5.8	5.9	6.2	6.1	5.8	6.0	5.9	6.0
Poland 6/.....	-	6.8	-	-	-	-	-	-
Portugal.....	15.8	16.3	16.7	15.8	17.6	18.0	18.0	-
Rumania 6/.....	-	40.7	-	-	-	-	-	-
Spain.....	68.9	70.0	88.0	81.5	79.0	77.0	88.0	66.1
United Kingdom.....	113.8	110.1	85.6	89.7	87.5	71.8	75.0	80.0
Yugoslavia.....	30.7	34.7	-	-	-	-	-	-
Estimated total	-	479.5	442.5	382.1	390.8	384.4	408.0	396.4
(excl. U.S.S.R.) 7/.....								
Soviet Union 8/	-	310.2	277.3	282.0	287.2	285.8	304.6	314.9
ASIA								
Iran.....	38.0	36.3	27.7	28.7	29.5	30.0	29.8	29.3
Iraq.....	18.5	21.6	22.0	23.0	24.2	24.2	24.2	26.7
Syria.....	11.1	10.7	12.0	13.6	13.3	12.7	12.1	12.0
Turkey.....	44.4	67.7	67.0	70.0	69.0	60.2	64.1	66.0

ASIA (Continued)

[illegible]

SOUTH AMERICA

Argentina 12/	361.0	411.0	505.0	505.0	515.0	475.0	419.0	418.0
Brazil 11/	35.0	35.5	40.0	39.0	45.0	48.0	-	48.0
Chile	33.8	32.6	37.5	37.5	38.6	39.2	41.9	46.3
peru 15/	18.4	19.4	16.9	16.2	17.6	15.9	17.2	18.0
Uruguay 16/	110.6	126.2	156.6	175.2	176.0	158.7	119.9	150.0
Estimated total 11/	574.8	638.9	772.2	790.0	809.7	754.3	695.8	697.0

AFRICA

[illegible]

OCEANIA

Australia.....	1,010.5	1,051.9	1,016.5	936.2	976.8	1,019.0	1,065.0	1,095.0
New Zealand.....	281.1	313.8	372.0	365.0	360.0	345.6	335.0	330.0
Estimated total.....	1,291.8	1,365.9	1,388.6	1,301.3	1,336.9	1,364.7	1,400.1	1,425.1
Estimated world total 20/.....	3,640.0	3,930.0	3,930.0	3,800.0	3,820.0	3,720.0	3,720.0	3,730.0

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and El Salvador. 4/ Includes Southern Dobruja beginning 1944. 5/ Data for Netherlands 1945 and 1946 not comparable with prewar and 1947. 6/ Based on present boundaries. 7/ Includes estimates for Albania and for countries producing 2 million pounds or less, namely Belgium, Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. 8/ Based on the number of sheep and an average fleece weight of 4.7 pounds per head.

9/ Includes Lebanon. 10/ Includes China proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkistan), Outer Mongolia and Tibet. 11/ Includes Pakistan. 12/ Includes estimates for Cyprus, Palestine, Transjordan and Outer Mongolia. 13/ Based on estimates of the Buenos Aires Branch, First National Bank of Boston through 1947. 14/ Estimates based largely on production in Rio Grande do Sul, which produces about 80 percent of the total. 15/ Based on surveys of the Junta Nacional de la Industria Lener. 16/ Estimates of the Camara Mercantil de Productos del Pais (Mercantile Exchange of Uruguay). 17/ Includes relatively small production in Bolivia, Colombia, Ecuador, Falkland Islands, Paraguay, and Venezuela. 18/ Union of South Africa, Union Protectorates and South West Africa. 19/ Includes estimates for Kenya, French West Africa and Togo. 20/ Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted.

indigenous production in the United Kingdom, a major importing country, is expected to be 80 million pounds, a further increase from last year, reflecting recovery from the unfavorable weather conditions in 1946 and 1947. France and Italy have increased production somewhat over last year, but are still below prewar. Eastern European countries made small gains in wool output over the past year, but also are somewhat below prewar production. The European total, however, is approximately 396 million pounds as compared to 408 million pounds for the previous year and 430 million pounds for the prewar years. The Soviet Union is expected to increase its production above 1948 and is now believed to be slightly above prewar.

Only minor changes in wool production are expected for countries in Asia with the exception of Turkey and Iraq. These 2 countries report a decrease of 3 million and 5 million pounds respectively. The total Asiatic production is indicated at 331 million pounds, compared with 341 million pounds for last year and 344 million pounds for the prewar average.

Wool production prospects in South America for the season beginning this fall are only slightly greater than 1948. The major producing countries of Argentina and Uruguay are not expected to increase their production, due in part to weather conditions, competing crops and reduced exports resulting from prices being held above the world level. Production in Brazil is estimated at 48 million pounds in 1949, approximately the same as the last two years. Output in Chile is likely to increase from 42 million to around 46 million pounds. The total production in South America is expected to be approximately 698 million pounds in comparison with 696 million pounds for 1948 and 639 million pounds in the prewar years 1936-40.

The output in the Union of South Africa, the largest wool-producing country on the African continent, is estimated to be about 8 percent below the 1936-40 average. The present drought conditions are expected to affect the lambing percentages, quality and quantity of wool. This will halt the upward trend and generally slow down the recovery to the prewar level.

With good growing weather over the greater part of Australia's pastoral areas, the present outlook for 1949 season is promising and is now estimated at about 1.1 billion pounds. This is the third consecutive year that production has exceeded 1 billion pounds. Production this season will be approximately 4 percent greater than the 1936-40 average, but somewhat under the peak years of 1941, 1942 and 1943.

Wool production in New Zealand this year is expected to be only slightly under the 335 million pounds of last year. Recent high prices paid for breeding stock indicate considerable interest in flock expansion.

The wide interest shown in breeding stock in most countries, together with a relatively high rate of consumption and high world prices, is likely to encourage an increase in sheep numbers and larger world wool production.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report, the committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Elmer A. Reese, Eugene T. Ransom, and Iazar Volin.

WORLD HARD FIBER PRODUCTION REMAINS BELOW PREWAR AVERAGE

The world production in 1948 of the 3 principal hard fibers--abaca, henequen, and sisal--was approximately 8 percent less than the average annual production during the 5 prewar years, 1934-38, according to the best available information at this time. Wartime production during the years 1941-45 averaged about 25 percent below the prewar average, principally because of the decline in output in the Philippines and Indonesia. Production fluctuated during the early stage of World War II and again in the early postwar years of 1946-48.

The total production of these 3 fibers was made up in prewar years of about 43 percent sisal, 36 percent abaca, and 21 percent henequen. That proportion was changed under the influence of war conditions in the years 1941-45 to about 54 percent sisal, 13 percent abaca, and 33 percent henequen. Slow recovery in the Philippines and Indonesia and increased production in Mexico, British East Africa, and many of the other henequen and sisal producing countries have combined to keep the ratio among the 3 fibers little changed since the war closed. Preliminary estimates of 1948 production indicate about 53 percent sisal, 28 percent henequen, and 19 percent abaca.

Abaca is the fiber most preferred for hard wear, particularly where resistance to deterioration by water is important. Production in 1948 is estimated at 208.8 million pounds, compared with a prewar average of 427.0 million and a wartime average of 111.6 million pounds.

The principal source of abaca is the Philippine Republic where about 97 percent of the total abaca production originated before the war. War-time data for the Philippines are incomplete, but it is believed that not more than an average of 100.8 million pounds was processed in 1941-45. During the Japanese occupancy from 1942 to 1945 many plantations were destroyed and others were badly neglected. Since 1945 there have been many uncertainties concerning the working of the Davao plantations.

Indonesian production was practically at a standstill during the late years of World War II and the succeeding years of political unrest within the country. The data shown for 1946 may relate to fiber processed

FIBERS: World production of the principal hard fibers,
representative prewar average to 1948

Commodity and country	Average : (5-year):	Calendar years	Average : (5-year):	Calendar years (preliminary)			
	1934-38	1939	1940	1941-45	1946	1947	1948
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
<u>Abaca</u>							
Philippines, Republic of 1/...	415.0	317.8	379.9	2/ 100.8	109.3	221.6	163.3
Indonesia 3/.....	8.0	10.0	9.0	3.0	0.1	4/	5.0
British North Borneo.....2/	4.0	4.7	2/ 3.9	2/ 0.6	-	-	-
Central America.....	-	-	0.2	7.2	12.2	36.1	40.2
Other.....	-	-	-	-	0.1	0.7	2/ 0.3
Total abaca.....	427.0	332.5	393.0	111.6	121.7	258.4	208.8
<u>Henequen</u>							
Mexico.....	212.1	188.9	212.2	256.7	238.3	258.2	264.6
Cuba.....2/	28.2	32.9	37.9	27.5	30.5	28.7	28.3
El Salvador.....	6.4	7.2	7.8	8.3	6.9	5.1	6.5
Other.....	-	-	-	-	0.1	0.2	0.1
Total henequen.....	246.7	229.0	257.9	292.5	275.8	292.2	299.5
<u>Sisal</u>							
British East Africa.....	261.0	301.1	290.6	291.6	299.8	299.8	357.4
Indonesia 5/.....	167.0	216.0	196.0	2/ 90.0	2/ 15.0	2/ 4/	2/ 6.4
Mozambique 6/.....	32.3	26.3	23.8	35.3	35.0	36.3	41.7
Haiti.....7/	13.3	16.5	17.4	1/ 17.4	8/ 22.5	8/ 38.8	8/ 48.4
Angola (Port. West Africa).....9/	11.3	12.7	15.0	21.3	30.9	27.9	35.3
French West Africa.....9/	9.8	6.8	-	2/ 5.6	9/ 3.0	3.3	3.3
Madagascar.....2/	5.3	6.2	5.5	5.0	0	2.4	5.5
Brazil.....	4/	4/	-	2/ 5.7	20.7	21.2	52.9
Formosa (Taiwan).....	-	-	-	1.9	0.1	2.4	4.3
Other British Africa 2/.....	3.0	1.4	0.7	0.7	0.7	0.9	0.9
Other Western Hemisphere 2/.....	1.5	0.7	1.4	3.3	6.0	6.8	7.5
Other countries.....	1.5	0.3	4.4	0.9	0.5	0.4	0.4
Total sisal.....	506.0	588.0	554.8	483.8	450.5	449.8	581.5
Total abaca, henequen and sisal.....	1,179.7	1,149.5	1,205.7	887.9	848.0	1,000.4	1,089.8

1/ Years 1934-1940 converted on basis of 278.88 pounds to the bale, but years 1941-1948 converted on basis of 278.3 pounds to the bale. Data for the years 1939-1940 and 1946-1948 include only fiber inspected by the Philippine Fiber Inspection Service and represent only about 90 to 95 percent of total production. 2/ Estimates based on incomplete data. 3/ Estimated at about 4 percent of total hard fibers produced in Indonesia for years 1934-1940, and at less than 4 percent of total hard fibers exported plus an estimate of domestic consumption for the year 1941. The years 1942, 1943, and 1945 are estimated from partial data on production. 4/ Less than 50,000 pounds. 5/ Estimated at less than 95 percent of total exports of hard fibers in 1934 and 1941, and at approximately 90 percent of total production of hard fibers in the years 1935-1940. 6/ Exports, excluding tow, for crop year ending June 30 of the year indicated for 1934-1945. Production, including tow, for calendar years 1946-1948. 7/ Exports for year ending September 30 of the year indicated and excluding local consumption which probably amounted to less than one million pounds annually prior to 1946. 8/ Total production for calendar year, including peasant-cleaned fiber which has increased in quantity in recent years to between 6.5 and 10.0 million pounds per year in 1946-1948. 9/ Exports, which are approximately equal to production, or production estimate based on trade data.

Office of Foreign Agricultural Relations. Compiled from official statistics when available, supplemented by reliable trade estimates and reports of Foreign Service officers, except where noted.

from earlier crops. Abaca, sisal, and cantala are not separated in data for production and exports of Indonesia, and the relative proportion of these fibers must be estimated from general information relating to the situation. It is believed that a larger percentage of the prewar production of abaca was retained within the country than was the case for sisal; therefore, production data would comprise a slightly larger percentage of abaca than would export data. Reports of late years indicate that abaca production is recovering better than sisal, and that cantala which, it is believed, was formerly about 6 percent of the hard fibers of Indonesia, is now negligible.

Abaca has been produced in North Borneo but has been neglected in recent years. However, reports indicate that production may be revived again, at least on an experimental basis.

Prior to the war, Central American abaca was grown on an experimental basis, starting with a few plants set out in 1925. When the oncoming war threatened to cut off the Philippine fiber supply from the Western Hemisphere, commercial planting was undertaken and the area was expanded rapidly. From the limited crop of about 200 thousand pounds in 1940, production has now increased to 40.2 million pounds, excluding waste.

Abaca is now produced in several other countries, including Ecuador, Martinique, Burma, British Honduras, and British Malaya, but the fiber is obtained principally from small or experimental acreages and from scattered plants, and is generally consumed domestically.

Henequen is used mostly for binder twine and cordage for purposes where cost is of first importance, strength important but secondary, and appearance relatively unimportant. Mexico accounts for about 88 percent of henequen production, with an output of 264.6 million pounds in 1948 compared with a wartime average of 256.7 million and a prewar average of 212.1 million pounds.

Cuban production of henequen, which was estimated at 28.3 million pounds in 1948, is approximately equal to the prewar average output and only slightly greater than the wartime average of 27.5 million pounds.

The fiber produced in El Salvador is actually Agave letonae but is marketed as "Salvadoran sisal" or "Salvadoran henequen" and has qualities much like henequen. Production in 1948 was estimated at about 6.5 million pounds, compared with a prewar average of 6.4 and a wartime average of 8.3 million pounds.

The demand for hard fibers during the war and early postwar periods has encouraged expansion in production, and experimental plantings with small production of henequen fiber have been reported in Honduras, Costa Rica, and Spain.

Sisal is somewhat coarser than abaca and generally more flexible than henequen. It is, therefore, suitable for strong cordage with good appearance. It is used both as a substitute for abaca in heavy rope and for commercial twine of good quality.

British East Africa accounts for the greatest share of the world production of sisal, with 357.4 million pounds or 61 percent of the total of 581.5 million pounds in 1948, compared with a prewar average of 261.0 million pounds or 52 percent of the total of 506.0 million pounds in 1934-38. The wartime average of 291.6 million pounds in British East Africa is in line with the steady upward trend of sisal production throughout the whole sisal producing world.

Indonesia, as was explained in the foregoing paragraph on abaca production in that country, was an important source of hard fibers prior to 1941 but was reduced to a minor source by war damage and civil unrest. Recovery of the sisal industry has been negligible, and production in 1948 is estimated from fragmentary information to approximate only 6.4 million pounds.

Mozambique ranked third in sisal production until 1948 when its output of 41.7 million pounds was exceeded not only by British East Africa, which consistently ranks first, and Haiti, which replaced Indonesia in second place toward the close of the war, but also by Brazil where production increased from a negligible quantity as late as 1939 or 1940 to 52.9 million pounds in 1948.

The only decreases in production since the prewar period occurred in African and Asiatic countries where food production competed with the fiber industry for labor or where shipping or economic conditions tended to discourage fiber output.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

BRAZILIAN RICE SURPLUS TO BE SMALLER THAN EXPECTED

Probable rice exports from Brazil during 1949 are forecast at 120 million pounds, rather than the 200 million pounds predicted earlier in the season, according to a report from the American Consulate, Porto Alegre, Brazil.

The downward revision in the estimate of availabilities is due to a production drop resulting from a prolonged dry spell during the growing season, and the prohibition of exports by the Brazilian Government until supplies are reserved to meet 1949 requirements. Record Brazilian rice exports in 1947 amounted to 546 million pounds. In 1948 exports totaled 456 million.

The 1948-49 crop of the State of Rio Grande do Sul is expected to supply another heavy domestic trade movement rather than large exports. On account of considerable losses in the harvest of the central States, Rio Grande do Sul again may be required to supply the needs

of other domestic markets. This is being confirmed by the relatively high number of rice purchases being made by Parana in Rio Grande do Sul, where harvesting has just been concluded.

Exports to foreign countries from the current crop, therefore, are likely to be smaller than those of the 1947-48 harvest from which approximately 140 million pounds were shipped abroad. Of the total export surplus, which is expected to approximate 120 million pounds in terms of polished rice, the State of Rio Grande do Sul will account for not more than 70 million pounds.

CUBAN RICE PURCHASES INCREASE SLIGHTLY

The Cuban rice market became moderately active during May with Habana brokers reporting about 23 million pounds sold during the first 4 weeks, the largest monthly sales since January. Increased purchases reportedly were brought about by reports that the 1949 United States rice crop will be late. Brokers report that demand is strong for Rexora and Blue Bonnet, but claim that it is becoming increasingly difficult to procure these varieties in the United States.

Monthly rice purchases in 1949 reported through May, and which totaled 70 million pounds, were as follows (million pounds); January, 35; February, 4; March, 1; April, 3; and May, approximately 27. All purchases have been of United States rice. Indications are that from 10 and 20 million pounds of United States rice may be purchased by Cuba for shipment before August 1.

Rice arrivals into Cuba during May approximated 20 million pounds, a slightly smaller quantity than the 22 million pounds taken in April, according to data compiled from ships' manifests. Arrivals from January through May 1949 amounted to 208 million pounds, all from the United States. Milled rice prices ranged from \$8.50 for Patna, 25 percent broken, to \$12.75 for Rexora and/or Blue Bonnet, 10 percent second heads, per 100 pounds, c.i.f. Habana.

U. S. RICE EXPORTS HEAVY IN APRIL

United States rice exports in April totaled 117 million pounds, the largest in 4 months. Of this volume, 66 percent went to the Far East, primarily to China and the Philippines. Exports to European countries were the heaviest since World War II, and comprised 13 percent of the total. Deliveries to Cuba, however, were the smallest since August 1948.

The August-April exports of the 1948-49 marketing year amounted to 738 million pounds, a slight gain over the 728 million pounds exported during the corresponding months of the preceding year. Exports to Cuba increased 6 percent. Consignments to Europe also were substantially larger, the principal destinations being Greece, Austria, and Belgium-Luxemburg. Some countries taking less rice in the current marketing year than the year before are China, Korea, and Canada.

Monthly exports of United States rice so far in the current marketing year have been as follows (milled pounds): August, 19; September, 41; October, 83; November, 118; December, 147; January, 92; February, 70; March, 51; and April, 117. Of the 738 million pounds exported, 700 million were milled rice, including broken, and 38 million pounds were rough rice converted to terms of milled. Rough rice exports during the period totalled 58 million pounds, of which 99 percent was delivered to Canada.

RICE: United States exports to specified countries, April 1949, with comparisons 1/

Continent and country	August-July		August-April		April	
	1937-38	to 1947-48	1947-48	1948-49	1948	1949
	1941-42			2/		2/
	Million	Million	Million	Million	Million	Million
	pounds	pounds	pounds	pounds	pounds	pounds
Switzerland.....	4	3/	3/	1	0	3/
Austria.....	4/	9	9	11	0	3
Greece.....	6	9	8	17	2	9
Belgium and Luxemburg.....	7	3/	3/	5	0	3
Total Europe :	43	22	20	38	4	15
Cuba.....	275	527	409	435	26	16
Canada.....	19	54	52	38	2	6
Br. West Indies :	3/	11	9	7	4	3/
Philippines.....	3/	3/	3/	26	0	26
China.....	5/	203	165	66	57	51
Indonesia.....	5/	1	1	89	3/	0
Korea.....	5/	54	49	0	0	3/
Other countries :	21	23	23	39	3/	3
Total.....	353	895	728	738	93	117

1/ Milled rice, including brown, broken, screenings, and brewers' rice, and rough rice converted to terms of milled at 65 percent. 2/ Preliminary. 3/ Less than 500,000 pounds. 4/ Not separately classified. 5/ If any, included in "Other countries".

Bureau of the Census.

BURMA EXPORTS LESS RICE IN 1949

Exports of rice from Burma during May equalled 322 million pounds, a decrease from the 387 million pounds shipped in the same month a year earlier. January-May 1949 exports totaled approximately 1,550 million pounds, or 8 percent less than deliveries during the corresponding period of the year before. The Government of Burma proposes to export 225 million pounds in June, provided the rice is transported from the interior to the ports. This would bring total exports during the first half of 1949 to around 1,750 million pounds compared with approximately 1,950 million shipped from January to June in the preceding year.

ARGENTINA REDUCES PRICE OF CORN FOR DOMESTIC USE

The Argentine Trade Promotion Institute will sell 1947-48 corn for domestic use at the equivalent of 76 cents per bushel, bagged on track at storage points, according to a recent announcement. Bulk corn, under the same conditions, is to be made available at 70 cents per bushel. These prices compare with the reductions to 91 cents for bagged and 85 cents for bulk corn for feeding, announced early in April.

Successive lowered prices to domestic users have been made in an effort to clear space in commercial storage for the new crop still being harvested. The old-crop corn, for which the Government paid \$1.06 per bushel, is reported in very bad condition with heavy insect damage. Efforts to move old grain include an increase in insect damage tolerance to 40 percent without discount, effective from March 18.

Reports indicate that considerable quantities of old-crop corn remain unshelled on farms, and the Trade Promotion Institute will not be able to accept delivery on much of the new crop for some time. Carry-over of old corn at the beginning of the new season (April 1) is now unofficially placed at about 65 million bushels, much of it in unmarketable condition.

In response to grower demands for assistance, the Government has announced that special loans will be granted on 1948-49 unshelled corn held on farms. The price to producers this season was set at \$1.17 per bushel and these loans are to be about 60 percent of that price and may run to October 31, 1949.

The current harvest is still placed at a maximum of 200 million bushels. Yields are reported as highly variable, seldom exceeding normal levels in any area and frequently being very low. Labor shortages are delaying the harvest, and weather conditions have been unfavorable for harvesting, with little of the cold, dry weather which is needed to condition the crop properly.

FATS AND OILS

SWEDEN'S FATS AND OILS SITUATION IMPROVING

Sweden's fats and oils situation is expected to improve considerably in 1949, according to the American Legation, Stockholm. This forecast is based on the expansion of the 1949 domestic oil crop acreage and the prospect of some increase in the production of butter and other fats. Total availability of fats and oils, including butter, in 1949 is estimated at 239,000 short tons, an increase of 9 percent over the 219,400 tons available in 1948 and 15 percent over the 208,700 tons in 1938.

Due to the introduction of oilcrops during the war, the output of fats and oils on the basis of domestically produced seed has increased substantially in recent years. Vegetable oil production from domestically produced oilseeds is forecast at 70,100 tons for 1949 compared with 41,400 in 1948 and 16,100 in 1947. In addition Sweden anticipates an output of 11,000 tons of tall oil this year compared with 9,900 tons last year and 8,800 in 1947. Prewar production of tall oil, which has been used principally for the manufacture of soap and soap powder, was insignificant.

This year's production of animal fats, including butter, is estimated at 130,300 tons or 3 percent higher than the 1948 output and 12 percent above that of 1938.

Margarine production in 1949 is estimated at 71,650 tons compared with 54,200 in 1948 and about 65,000 in 1938. The anticipated increase is due to the abolishment of butter and margarine rationing in April 1949 in combination with a reduction in the price of margarine and an increase in the price of butter.

The relatively strong increase in the domestic production of fats and oils has been more than offset by a decline in imports. During the current year imports, including the oil equivalent of imported oilseeds and imports of butter and margarine, are expected to total 66,000 tons compared with 161,900 tons in 1938. Exports also have declined from 59,600 tons in 1938 to a possible 16,500 this year.

Wholesale prices of domestic rape and mustard oil for the 1948-49 season range from 2.20 to 2.40 kronor per kilogram (27.8 to 30.3 cents per pound). Average c.i.f. prices of imported fats and oils during the first quarter of 1949 were: whale oil, 1.86 kronor per kilogram (23.5 cents per pound); hydrogenized animal fat, 1.81 (22.8 cents); castor oil, 2.17 (27.4 cents); tung oil, 2.36 (29.8 cents); cocoa oil, palm oil, and other vegetable oils, 1.99 (25.1 cents). Of oilseeds only copra was imported in any quantity during the first quarter of 1949. The average c.i.f. price of this commodity was 1.15 kronor (14.5 cents).

CEYLON'S COPRA AND COCONUT OIL EXPORTS CONTINUE TO INCREASE

Ceylon's copra exports in the first quarter of 1949 totaled 10,709 long tons compared with only 727 in the comparable period of 1948 and a total of 54,461 tons for the year 1948. Over 75 percent of the January-March exports were destined to European countries, of which 2,235 tons were sent to The Netherlands and 2,150 to Switzerland.

Coconut oil exports in the first 3 months amounted to 25,134 tons, representing an increase of 30 percent over the January-March 1948 figure of 19,323. This was approximately one-third the total 1948 shipments of 75,730 tons. The United Kingdom was sent 8,900 tons or 35 percent of the 3-month total. Most of the remainder was shipped to other European and to Asiatic countries.

CEYLON: Copra and coconut oil exports,
January-March 1949 with comparisons

(Long tons)

Country	Copra distribution			Coconut oil distribution				
	Average : 1935-39	1948 1/ : 1948 1/	Jan.-March 1949 1/ : 1949 1/	Average : 1935-39	1948 1/ : 1948 1/	Jan.-March 1949 1/ : 1949 1/	1948 1/ : 1948 1/	Jan.-March 1949 1/ : 1949 1/
United States	1	-	-	30	2,362	-	-	-
Canada	-	-	-	8,523	-	-	-	-
West Indies	-	-	-	881	-	-	-	-
Denmark	1,605	3,395	145	35	-	-	-	1,726
France	354	287	51	347	463	-	-	3,627
Germany	1,482	-	-	1,200	3,418	-	-	1
Greece	1,526	45	25	120	-	-	-	56
Italy	6,541	6,210	25	1,724	5,132	56	-	3,295
Netherlands	-	2,742	-	-	2,424	-	-	2,583
Norway	150	1,497	-	45	-	-	-	-
Switzerland	-	3,136	-	84	100	-	-	98
United Kingdom	420	10,757	469	14,160	52,374	18,549	-	8,900
Other Europe	4,423	1,450	-	9,441	42	-	-	60
Cyprus	-	-	-	146	223	75	-	1,040
India	42,553	7,604	-	10,769	6,182	615	-	392
Iraq	20	79	10	315	65	-	-	2,777
Pakistan	-	16,282	-	-	2,014	-	-	19
Palestine	-	-	-	15	110	-	-	35
Syria	60	965	-	164	25	-	-	15
Other Asia	360	12	2	2,406	47	20	-	531
Egypt	425	-	-	2,433	524	-	-	-
Union of South Africa	-	-	-	2,597	-	-	-	-
Other countries	7	-	-	3,578	225	8	-	35
Total	59,927	54,461	727	59,013	75,730	19,323	-	25,134

1/ Preliminary.

American Embassy, Colombo.

By the end of June 1949 it is estimated that 16,500 tons of coconut oil will have been shipped to the United Kingdom under the terms of the contract between the 2 countries. This leaves a balance of 23,500 tons or about 4,000 tons per month to be shipped the last half of the year. It is estimated that over and above the amount to be shipped to the United Kingdom there will be about 50,000 tons of copra and/or coconut oil available for export to other countries during 1949.

Monthly wholesale prices (contract prices) obtained during the first quarter of 1949 were: \$181.00 per ton for copra Estate No. 1 and \$308.22 for coconut oil White, wharf delivery.

NORWEGIAN EXPORTS OF COD LIVER OIL INCREASE IN 1948

Norway's exports of all types of cod liver oil increased in 1948 by 24 percent over the total for 1947. The large increase in exports was mainly in pale cod liver oil, waste oil and grakse. Steamed medicinal cod liver oil exports declined in 1948 as did the industrial oils. Exports of steamed medicinal cod liver oil have remained at a relatively high level for the past 3 years. In 1948 the United States was the heaviest taker of this oil.

NORWAY: Exports of cod liver oil by type, annual 1946-48

Type	1946	1947	1948
	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>
Steamed medicinal cod liver oil	2,796,187	2,592,481	1,880,213
Raw medicinal cod liver oil	48,635	2,271	19,232
Pale cod liver oil	1,514,462	2,375,408	3,584,432
Light brown industrial cod liver oil	674,175	482,568	379,091
Brown industrial cod liver oil	17,356	12,548	4,544
Stearine	-	-	246
Waste oil and grakse	-	-	902,977
Total	5,050,815	5,465,276	6,770,735

American Consulate, Bergen

The present export price of medicinal cod liver oil is \$67.50 per 30 gallon drum, c.i.f., east coast of the United States. The price last year of \$73.50 was increased on July 12, 1948 to \$77.00 and on January 20, 1949, reduced to the present price. It is understood that the Government export tax on this price is about 50 Norwegian kroner or approximately \$10 per drum. The present government fixed price to the producer of medicinal cod liver oil is 210 Norwegian kroner or about \$42.47 per barrel of 107 kilograms, f.o.b., Lofoten district and 205 Norwegian kroner or \$41.46 for Finnmark district.

NORWAY: Exports of steamed medicinal cod liver oil
by country of destination, annual 1946-48

Country	1946	1947	1948
	Gallons	Gallons	Gallons
United States	350,956	353,545	368,181
Belgium	66,097	96,635	86,359
France	101,073	163,736	99,700
Italy	178,846	229,991	110,240
Netherlands	214,061	175,307	285,705
Poland	122,551	267,319	252,525
U.S.S.R.	414,279	-	-
Sweden	352,330	409,286	43,642
Czechoslovakia	307,685	571,791	-
Turkey	40,974	-	97,164
Others	647,335	324,961	536,697
Total	2,796,187	2,592,481	1,880,213
American Consulate, Bergen.			

The outlook for the 1949 production of cod liver oils is not promising. The catch for the first 3 months of the season was reported to be about 12,000 short tons under that for the same period last year. It is anticipated that there will be fewer cod along the coast of Norway and efforts are being made to extend the fishing further afield, principally near Greenland. It has been decided to expend considerable funds on the purchase and equipping of additional trawlers and larger fishing boats.

The increased use of trawlers has been opposed by many persons as being uneconomic since it results in indiscriminate catching of all types and sizes, thereby possibly depleting the supply of cod. Experiments conducted in the Lofotens with a new type of dragnet have so far shown promising results. Since 1947 the Government has been marking fish and reports of the markings made in 1947 and 1948 are beginning to be received principally from the Lofoten district. It is hoped in this way to follow the movements of the fish and so increase future fishing possibilities.

CORRECTION

In the article "U. S. Imports of Specified Vegetable Oil and Oilseeds" in Foreign Crops and Markets of June 13, 1949 (Vol. 58, No. 24) page 582, imports of tung oil for January-April 1949 should have read 25,896 instead of 24,317.

PHILIPPINE COPRA EXPORTS *
SEOW INCREASE IN MAY

The following table shows copra exports from the Philippine Republic, May 1949 with comparisons:

PHILIPPINE REPUBLIC: Copra exports, May 1949 with comparisons
(Long tons)

Country 1/	Copra distribution					
	Average	1948 2/	Jan-May	May		
	1935-39		1949 2/	1948 2/	1949 2/	
United States (total)...	206,801	364,102	104,009	36,976	33,295	
Atlantic Coast....	-	61,618	14,956	2,000	1,679	
Gulf Coast.....	-	69,320	14,455	5,184	3,803	
Pacific Coast.....	-	233,164	74,598	29,792	27,813	
Canada.....	-	17,049	2,250	2,500	-	
Costa Rica.....	-	100	-	-	-	
Mexico.....	7,260	-	-	-	-	
Panama Canal Zone.....	-	707	775	-	455	
Panama, Republic of....	-	1,357	209	-	-	
Colombia.....	-	6,995	-	-	-	
Venezuela.....	-	3,868	1,133	-	-	
Austria.....	-	6,000	-	-	-	
Belgium.....	10	1,000	1,750	-	500	
Denmark.....	6,025	26,536	11,000	-	6,000	
France.....	24,589	65,912	23,757	3,500	4,000	
Bizonal Germany.....	7,309	17,250	3/ 20,000	500	5,000	
Italy.....	4,079	21,900	8,218	-	-	
Netherlands.....	28,415	8,949	4,050	-	1,000	
Norway.....	91	9,276	4,500	3,100	-	
Poland.....	-	31,749	1,500	-	-	
Sweden.....	4,183	4,748	3,850	750	2,850	
Switzerland.....	-	1,000	-	-	-	
Japan.....	1,047	24,339	3/ 6,075	-	-	
Syria.....	-	1,443	-	-	-	
Egypt.....	1,271	-	-	-	-	
Union of South Africa..	-	-	1,254	-	30	
Others.....	8,758	11,350	4/ 10,574	-	4,474	
Total.....	299,838	625,630	3/ 204,904	47,326	57,604	

1/ Declared destination. 2/ Preliminary.

3/ April shipments revised upward 2,000 tons - 1,500 to Germany, 500 to Japan.

4/ 6,000 to Trieste; 2,000 to Algeria; 2,474 to Palestine; and 100 to others. American Embassy, Manila.

* A more extensive statement may be obtained from the Office of Foreign Agriculture Relations.

INDONESIAN COPRA EXPORTS DECLINE IN MAY

The following table shows copra exports from Indonesia, May 1949 with comparisons:

INDONESIA: Copra exports, May 1949 with comparisons (Long tons)

Country	Copra distribution					
	Average	1948 1/	Jan- May	May		
	1935-39		1949 1/	1948 1/	1949 1/	
Canada.....	-	8,320	3,150	-	-	850
Mexico	12,614	-	-	-	-	-
United States.....	3,909	5,734	13,100	-	-	5,000
Belgium.....	8,053	8,018	4,000	-	-	-
Czechoslovakia.....	4,896	2,000	1,000	-	-	-
Denmark.....	72,375	4,120	-	-	-	-
France.....	12,748	5,937	-	-	-	-
Bizonal Germany.....	64,674	19,578	4,968	-	-	1,968
Italy.....	23,103	-	-	-	-	-
Netherlands.....	133,841	159,440	82,677	19,185	-	9,842
Norway.....	31,810	3,000	-	-	-	-
Poland.....	1,422	2,500	500	-	-	-
Sweden.....	6,886	11,670	-	2,000	-	-
Switzerland.....	17	6,500	1,000	2,000	-	-
United Kingdom.....	412	-	11,349	-	-	3,150
Japan.....	6,180	-	7,000	-	-	-
Singapore.....	107,285	-	-	-	-	-
Union of South Africa..	-	1,600	2,500	-	-	1,250
Others.....	17,160	-	-	-	-	-
Total.....	507,385	2/ 238,417	2/ 131,244	2/ 23,185	2/ 22,060	

1/ Preliminary

2/ Does not include unrecorded shipments to Singapore.

Copra Board, Batavia

CANADA AND NORWAY CHIEF SOURCES OF U.S. SUPPLY OF SHARK LIVER OILS

Canada and Norway were the main suppliers of the crude and refined shark liver oils imported by the United States during 1948 and the first 4 months of 1949. Total imports of refined shark liver oil into the United States in 1948 were 3,743,000 pounds, valued at \$6,434,116. Crude shark liver oil imports in 1948 totaled 92,000 gallons, valued at \$436,826.

Imports of refined oil in the first 4 months of 1949 have been somewhat lower than in the corresponding months of 1948. Canadian, Cuban, Argentine and Australian shipments have been lagging while Norwegian shipments have been higher than a year ago. Imports of crude shark liver oil into this country January through April of this year have been nearly 4 times greater than those of a year ago. Most of this large increase is accounted for in the shipments from Norway and Denmark.

UNITED STATES: Imports of refined shark liver oil by country of origin, in 1948 and January-April 1948 and 1949

Country	1948	January-April	
		1948	1949
	Pounds	Pounds	Pounds
Canada.....	1,676,899	615,203	203,402
Cuba.....	123,698	65,737	19,197
Chile.....	128,465	31,984	23,832
Argentina.....	274,463	157,455	9,902
Norway.....	1,274,371	672,418	710,483
Australia.....	96,484	14,886	-
Others.....	168,849	39,960	98,473
Total.....	3,743,229	1,597,643	1,065,289

(Hyphen (-) indicates no imports recorded.

Bureau of Census.

UNITED STATES: Imports of crude shark liver oil by country of origin, in 1948 and January-April 1948 and 1949

Country	1948	January-April	
		1948	1949
	Gallons	Gallons	Gallons
Canada.....	41,692	3,790	3,609
Denmark.....	-	-	9,441
Norway.....	49,285	4,976	24,327
Korea.....	-	-	1,705
Union of South Africa.....	-	-	3,000
Others.....	1,054	430	1,511
Total.....	92,031	9,196	43,593

Hyphen (-) indicates no imports recorded.

Bureau of Census.

SOUTH AFRICAN FISH OIL PRODUCTION INCREASES

The expected production of fish oils in the Union of South Africa for 1949 is 10,000 short tons, of which 4,000 tons would come from horse mackerel (maastbanker) and 6,000 tons from pilchard. Of this production 5,000 tons are expected to be sold as crude oil and the balance refined. Production of vitamin A oil for 1949 is expected to exceed the 1948 production which amounted to 14.205 x 10 U.S.P. units.

While sales will continue to be made to the British Ministry of Food with small quantities going to Western Europe and South Africa, efforts will be made to expand the United States market and to export to this country "a large percentage" of vitamin A concentrates in potencies of 200,000 to 1,000,000 U.S.P. units.

Production in 1948 of fish body and oils, processed from the maasbanker, was estimated at only 1,000 tons. The season was short, extending from November 1947 to March 1948, and there were only 2 plants producing oil last year. Production of pilchard oil in 1948 was also approximately 1,000 tons. The pilchard catch, both for canning and for the production of oil, increased so rapidly in the last year that the Fisheries Development Corporation is making strong efforts to bring about legislation to limit the number and size of factories to regulate production. Of the 2,000 tons of fish body oils produced in 1948, about 1,200 tons were exported as crude oils and the balance, classified as industrial oils, was consumed domestically. Of the remaining 800 tons, 400 tons of semi-crude oil was used for general industrial purposes and 400 tons was refined and used in the manufacture of paint, varnish, linoleum, and other products.

The entire production of vitamin A oil in 1948 was sold to the British Ministry of Food except for small quantities sent to Continental Europe. The large, newly constructed reduction plant came into operation in October 1948, so concentrates represented only 3 months output, the remainder being vitamin A crude. These oils came largely from the soupfin shark, hake (stockfish) and snoek.

TOBACCO

CANARY ISLAND'S TOBACCO PRODUCTION LARGER; CONSUMPTION AND IMPORTS HIGH

The Canary Islands' 1948 leaf tobacco crop was 47 percent larger than the 1947 production, according to the American Consulate in Tenerife. The consumption of tobacco products is high and the Islands must depend largely on imports to meet domestic requirements.

Tobacco production in 1948 is placed at 1,253,000 pounds from 1,233 acres, as compared with 851,400 pounds from 845 acres in 1947 and the 5-year,

1941-45, average of 424,700 pounds from 310 acres. The 1948 yield averaged 1,016 pounds per acre. This compares with 1,008 pounds per acre in 1947 and the 5-year, 1941-45, average yield of 1,370 pounds per acre.

The consumption of manufactured tobacco products in the Canary Islands during 1948 is officially estimated as follows: cigarettes, 740,000,000 pieces; cigars, 33,000,000 pieces; and smoking tobacco, 64,000 pounds. These figures appear high for a country of slightly over one-half million people, but they include substantial quantities of products sold to ships' crews and passengers and not recorded as exports.

Imports of leaf tobacco in 1948 totaled 4,199,000 pounds. The Dominican Republic supplied 1,807,200 pounds, or 43 percent of total leaf imports. The 1948 imports from Brazil, the second most important source of supply, totaled 662,300 pounds, or 16 percent of the total. The United States supplied 533,000 pounds, or 13 percent of the 1948 total. Other countries supplying substantial quantities of leaf in 1948 include Southern Rhodesia, Argentina and Cuba.

The Canary Islands' imports of manufactured tobacco products consist almost entirely of cigarettes from the United States and the United Kingdom. Cigarette imports in 1948 are officially reported at 388,300 pounds, of which 97 percent came from the United States. However, these figures do not include a substantial volume known to have been smuggled into the Islands.

Exports of manufactured tobacco products in 1948 are reported to consist of 64,000,000 cigars and a few million cigarettes. Most exports went to Spain, while the remainder went to Spain's African Colonies. No leaf tobacco exports were reported in 1948.

IRELAND'S TOBACCO IMPORTS DECLINE; CONSUMPTION HIGH

Ireland's imports of leaf tobacco declined in 1948 but the use of leaf in manufactured products during the year was maintained at record levels, according to the American Legation in Dublin.

Imports of leaf during 1948 totaled 12.5 million pounds, as compared with 14.4 million pounds in 1947 and 15.5 million pounds in 1946. A total of 12.3 million pounds, or about 98 percent of Ireland's 1948 leaf imports came from the United States. Other sources of supply include British East Africa, Southern Rhodesia and Syria.

Leaf tobacco used in the production of products in 1948 is estimated to about equal the record 1947 consumption of 12.4 million pounds. This compares with 12.0 million pounds in 1946 and 10.4 million pounds in 1945. Consumption in 1949 is likely to be somewhat higher as withdrawals from bond were increased in February from 110 percent to 115 percent of the release in the year ended March 1940.

DOMINICAN REPUBLIC ESTABLISHES
TOBACCO INSPECTION SERVICE

A tobacco inspection service for examining the preparation and packaging of all leaf tobacco prior to its export has been established in the Dominican Republic, according to the American Embassy in Ciudad Trujillo.

The tobacco inspection service was instituted by official action of the Dominican Secretary of Agriculture, Livestock and Colonization on May 20, 1949. The reasons given for establishing the service were to assure the best possible reception for Dominican tobacco abroad by improving its quality and to obtain the highest price possible for this important Dominican export product.

According to the order establishing the service, all agricultural instructors in tobacco districts are authorized to act as special tobacco inspectors in addition to carrying out their other duties. The heads of agricultural districts will act as supervisors and be responsible for all inspection work in their districts.

The inspection service is expected to have little effect in improving the quality of Dominican leaf, according to the Embassy. Few, if any, inspectors are tobacco specialists and consequently will be unable to give constructive suggestions on preparation and packaging procedures to experienced tobacco exporters. Also, the inspection service, as it is now set up, is susceptible to bribes from exporters in return for favorable reports on their tobacco.

CUBA INCREASES MINIMUM PRICES
FOR SUN-GROWN TOBACCO

Minimum prices to growers for sun-grown tobacco were increased by Cuban Government Decree No. 1481 of May 17, 1949, according to the American Embassy in Havana.

The new minimum prices for the 1948-49 crop are as follows: unstalked tobacco, \$20.00 per quintal (9.1 cents per pound); stalked, \$32.00 per quintal (14.5 cents per pound); strung, \$45.00 per quintal (20.4 cents per pound); and baled suckers or inferior grade leaf \$40.00 per quintal (18.1 cents per pound).

The minimum prices to growers for 1947-48 crop tobacco were as follows: unstalked tobacco, \$15.00 per quintal (6.8 cents per pound); stalked, \$30.00 per quintal (13.6 cents per pound); strung, \$45.00 per quintal (20.4 cents per pound); and baled suckers or inferior grade leaf, \$40.00 per quintal (18.1 cents per pound).

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, and the
U. S. gulf-port average

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria	:	:Kantar	:	:	:
Ashmouni, Good	6-16	: 99.05 lbs.	: Tallari	: 44.27	: 36.93
Ashmouni, F.G.F.	"	: "	: "	: 41.52	: 34.63
Karnak, Good	"	: "	: "	: 71.60	: 59.72
Karnak, F.G.F.	"	: "	: "	(not:quoted)	
Bombay	:	:Candy	:	:	:
Jarila, Fine	"	: 784 lbs.	: Rupee	: 620.00	: 23.86
Broach, Fine	"	: "	: "	: 650.00	: 25.01
Karachi	:	:Maund	:	:	:
4F Punjab, S.G., Fine ...	6-15	: 82.28 lbs.	: "	: 86.50	: 31.72
289F Sind, S.G., Fine ...	"	: "	: "	: 92.00	: 33.73
289F Punjab, S.G., Fine..	"	: "	: "	: 95.00	: 34.83
Buenos Aires	:	:Metric ton	:	:	:
Type B	"	: 2204.6 lbs.	: Peso	: 1/ 4000.00	: 54.03
Lima	:	:Sp. quintal	:	:	:
Tanguis, Type 5	"	: 101.4 lbs.	: Sol	(not:quoted)	
Pima, Type 1	"	: "	: "	: 430.00	: 42.16
Recife	:	:Arroba	:	:	:
Mata, Type 4	6-16	: 33.07 lbs.	: Cruzeiro	: 205.00	: 33.73
Sertao, Type 5	"	: "	: "	: 190.00	: 31.26
Sao Paulo	:	:	:	:	:
Sao Paulo, Type 5	6-15	: "	: "	: 194.00	: 31.92
Torreon	:	:Sp. quintal	:	:	:
Middling, 15/16"	6-16	: 101.4 lbs.	: Peso	: 197.00	: 23.84
Houston-Galveston-New	:	:	:	:	:
Orleans av. Mid. 15/16" ..	"	:Pound	:Cent	: XXXXX	: 2/ 32.60

Quotations of foreign markets reported by cable from U. S. Foreign Service posts abroad. U. S. quotations from designated spot markets.

1/ Nominal.

2/ Correction: Houston-Galveston-New Orleans average Middling 15/16" quoted 32.58 on June 9, should be 32.68.

PERU'S COTTON EXPORTS
AT LOW LEVEL

Exports of cotton from Peru during August-April 1948-49 totaled only 158,000 bales (of 500 pounds gross) compared with 217,000 for a similar period in 1947-48, according to Roy O. Westley, Agricultural Attache, American Embassy, Lima.

Both figures are well below the prewar average and the volume of exports since the end of the war. Exports to all destinations were lower this year except for small increases in those to the United Kingdom, India, and Italy. The decline in exports was due mostly to depletion of stocks and the small 1947-48 crop. Exports in 1949-50 must be drawn almost entirely from the crop now being harvested (since late in February) because old-crop stocks are practically exhausted.

Port stocks, which normally represent all except 20,000 to 30,000 bales in mills and elsewhere at the end of the season, were down to 19,000 bales on March 25 just before the new crop began to arrive on the market.

The 1948-49 crop is estimated at 306,000 bales compared with the small 1947-48 crop of 282,000 bales (revised). Weather conditions are reported to be good, and there is less damage by insects and diseases than in 1948. Acreage was increased in 1948-49 to 358,000 acres from 321,000 last year. A large part of the increase was in the Piura Valley where the Pima variety is grown. Sales of the 1948-49 crop totaled 84,000 bales by the end of April.

Consumption of cotton by local mills reached 60,000 bales in 1948. This is 7,000 bales more than in 1947 and is the highest on record. Consumer demand for textiles is still strong and per capita consumption is rising.

Peru's cotton exports for many years have been subject to a tax based on the difference between the cost of production as established by the government for tax purposes, and the contract price of the cotton sold. A decree of April 9, 1949, raised these cost figures for the 1948-49 crop to 160 soles per Spanish quintal (16 cents a pound) for Tanguis and 210 soles (21 cents) for Pima. Producers contend that the actual cost of production amounts to about 225 soles (22 cents) for Tanguis and 322 soles (32 cents) for Pima and are asking for an increase for tax calculations. Since the tax amounts to 50 percent of the difference between the cost of production and the sale price, the tax after such a change as requested would be reduced by half the amount of the increase in the base.

PERU: Exports of cotton by countries of destination, average 1934-38, annual 1945-47, Aug.-April 1947-48 and 1948-49

Country	Year beginning Aug. 1				Aug.-April	
	Average	1945	1946	1947	1947-48	1948-49
	1934-38	1945	1946	1947	1947-48	1948-49
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
United Kingdom..	163	123	58	53	43	74
Germany.....	90	0	0	3	2	0
Belgium-						
Luxemburg.....	16	20	17	29	18	16
Italy.....	4	26	31	6	3	8
France.....	9	17	9	0	0	1
Netherlands.....	13	11	14	18	16	5
Sweden.....	1/	4	2	1	1	0
Switzerland.....	0	43	29	19	17	6
Japan.....	29	0	0	0	0	1/
India.....	4	32	46	13	9	16
United States...	1	46	38	23	22	4
Argentina.....	2/ 1	4	6	6	6	3
Chile.....	7	37	41	34	29	5
Colombia.....	3/	30	55	37	33	15
Ecuador.....	3/	5	3	6	5	0
Venezuela.....	2/ 1	7	4	2	2	0
Others.....	2	19	13	17	11	5
Total.....	340	424	366	267	217	158

1/ Less than 50. 2/ 1 year only. 3/ If any, included in other countries.

AID PROGRAMS LIFT U.S. COTTON EXPORTS

Exports of cotton from the United States during August-April 1948-49 totaled 3,709,000 bales (of 500 pounds), compared with 1,520,000 bales for a similar period in 1947-48. The 12-month total for 1948-49 is expected to reach at least 4,700,000 bales, which will be the highest since 1939-40 when exports totaled 6,501,000 bales. Approximately three-fourths of the exports in 1948-49 were financed under the European Recovery Program, the China Aid Program and the revolving fund established for countries under military occupation.

Exports of cotton to nearly all of the countries not receiving aid under any of these programs were also increased sharply due to relatively lower prices for United States cotton during the past year. Supplies in the United States have been more than adequate for all demand since the large 1948 crop was harvested while stocks of American-type cotton in other producing countries were practically exhausted, causing sharp price increases in nearly all of them.

UNITED STATES: Exports of cotton by countries of destination; average
1934-38, annual 1945-47, Aug.-April 1947-48 and 1948-49

(Bales of 500 pounds gross)

Country	Year beginning August 1				Aug.-April	
	Average 1934-38	1945	1946	1947	1947-48	1948-49
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
Austria.....	0	0	4	3	0	48
Belgium.....						
Luxemburg....	147	75	182	53	48	126
Czechoslovakia..	65	70	101	22	21	32
Denmark.....	35	0	0	3	0	24
Finland.....	35	17	23	27	16	28
France.....	589	793	393	216	160	511
Germany.....	579	6	200	232	179	389
Greece.....	2	31	10	1	1	5
Italy.....	430	515	460	70	34	484
Netherlands....	86	48	116	35	33	147
Norway.....	13	1	5	3	2	11
Poland & Danzig:	224	104	49	50	50	65
Spain.....	101	161	42	3	0	54
Sweden.....	93	2	23	6	6	1/
Switzerland....	2	27	20	3	2	38
United Kingdom..	1,097	296	486	272	256	558
Yugoslavia.....	10	94	61	0	0	33
Other Europe...2/	85	4	0	1	2	44
Total Europe	3,593	2,244	2,175	1,000	810	2,597
Canada.....	261	321	320	138	112	236
Chile.....	3/	0	0	1/	0	46
Colombia.....	17	0	1	1	0	34
Cuba.....	7	6	34	13	13	4
India.....	44	1/	0	21	0	3
China.....	55	719	569	303	91	260
Japan.....	1,271	365	511	466	416	427
Fr. Indo-China..	3/	3	6	4	4	8
Korea.....	3/	0	0	59	59	29
Australia.....	5	13	9	11	11	0
Other countries:	43	7	17	9	4	65
Total.....	5,296	3,678	3,642	2,025	1,520	3,709

1/ Less than 500 bales. 2/ Includes 39 Portugal, 23 Soviet Union.

3/ If any, included in other countries.

Compiled from official records of the Bureau of the Census.

TROPICAL PRODUCTSINDIA'S 1948-49 COFFEE
CROP LARGER

The Indian Coffee Board now estimates the 1948-49 Indian coffee crop at 318,000 bags, composed of about three-fourths Arabica and one-fourth Robusta, according to the American Consulate General, Madras. Revised estimates place the 1947-48 crop at 268,000 bags and the 1946-47 crop at 260,000 bags. The average annual prewar, 1935-39, production was 278,000 bags.

Internal consumption of coffee in India is currently estimated at around 245,000 bags, and the exportable surplus from the 1948-49 crop should amount to approximately 73,000 bags. The Indian Coffee Board has fixed provisional export quotas from the 1948-49 harvest as follows: 8,467 bags to the United Kingdom, 5,080 bags to the United States, 3,387 bags to the Persian Gulf and Middle East countries, 3,387 bags to Switzerland, and 1,693 bags to Yugoslavia. In addition, it has indicated that the quota to the United Kingdom will be doubled at a later date if the stock position of coffee in India permits.

The total area now under coffee in India was recently estimated at 222,000 acres, comprised of 167,000 acres of Arabica and 55,000 acres of Robusta. There are 238,000,000 bearing trees in India at the present time. The 1948-49 crop yielded an average of approximately 190 pounds of green coffee per acre.

COFFEE CONFERENCE
HELD IN GUATEMALA

The Fourth Technical Conference of the Coffee Growers Federation of Central America and Mexico was held in Guatemala City from the period May 14 to 21. The following 9 countries are members of the Federation: Costa Rica, Cuba, Dominican Republic, El Salvador, Guatemala, Haiti, Honduras, Mexico, and Nicaragua. Delegates attended from each of these countries except the Dominican Republic. Graham S. Quate, Agricultural Attache for the American Embassy in Guatemala, attended as observer for the U.S. Department of Agriculture.

The principal working committee of the Conference was that set up to continue the work of establishing basic types and standard grades for coffee produced by member countries. There was considerable discussion concerning soil conservation and soil improvement methods which might be used to increase per-unit yields on coffee plantations.

Among the adopted resolutions, the one of greatest interest concerned the uniform coffee bag of 60 kilograms which the National Coffee Association has urged Latin American coffee producing countries to adopt for exportation of coffee to the United States. It concludes as follows:

"And whereas the studies made during this Conference amply demonstrate that the adoption of a uniform sack would result in no benefits to the economy of the coffee growers within the Federation, but that it would rather increase the cost of production;

"Be it resolved that each country within the Federation continue the exportation of coffee in the weights (or sizes of bags) to which they are accustomed."

Another resolution urged all national organizations within the Federation to do everything possible towards securing direct freight service between ports of the member countries and the U. S. port of Houston, Texas.

GUATEMALA'S EXPORTS OF ESSENTIAL OILS HIGHER

In 1948, Guatemala exported 876,000 pounds of citronella and lemongrass oils, more than double the 1947 shipments of about 400,000 pounds, according to the American Embassy in Guatemala. Exports for the first quarter of 1949 amounted to 250,000 pounds. Since production is relatively low during this period, it appears that total shipments for 1949 will substantially exceed 1 million pounds.

Guatemala supplied 791,000 pounds or 35 percent of total 1948 United States imports of citronella and lemongrass oils. This compares with 381,072 pounds in 1947, which was 19 percent of United States imports of citronella and lemongrass oils for that year.

FRUITS, VEGETABLES AND NUTS

U. K. DISPOSES OF SURPLUS POTATOES

The millionth ton of potatoes to be sold as stock feed in England was handed over to the purchaser by the United Kingdom's Ministry of Food during the week of May 8 according to a recent report from the American Embassy in London. This is equivalent to 37.3 million bushels.

From the large 1948 potato crop in the United Kingdom some 56 million bushels have been considered as surplus above the usual utilization and had to be disposed of by the Ministry of Food. Of this quantity, roughly 37.3 million bushels have been sold as stock feed, 9.3 have been dried by the Sugar Beet Corporation for potato meal, 5.1 million have been converted to various other products by various processing plants and there have been 1.5 million bushels exported. Sales of potatoes for feeding purposes continue in a small and diminishing volume.

Utilization of the total 1948 crop of 451 million bushels has been estimated approximately as follows:

	<u>1,000 bushels</u>
Consumption	261,300
Seed requirement	56,000
Waste and shrinkage	37,300
Other feeding	37,300
Surplus disposal	56,000
Other	<u>3,100</u>
Total	451,000

The 56 million bushel surplus disposed of by the Ministry of Food constituted about 12 percent of the total 1948 crop. The Ministry came into possession of the surplus potatoes in somewhat the same way the United States Government took title to surpluses in this country. The Ministry guaranteed an average price to growers of 175s. per ton (about 94 cents per bushel at the present rate of exchange) for 1948 crop potatoes. That price varied according to grade, districts and month of the year from 70 cents to about \$1.20 per bushel. To assure these prices the Ministry of Food became buyers of any lots of potatoes offered to it at these fixed levels. Early resale prices by the Ministry to stock feeders were 50 cents per bushel. These were reduced in October to 43 cents and again in March 1949 to 32 cents. Prices were for bulk potatoes.

Data are not available from the United Kingdom on the amount of surplus potatoes sold at each price, but assuming a rough average of 40 cents per bushel, it would appear that the potato purchase program in the United Kingdom may have cost the Ministry, excluding any transportation costs, a net loss of roughly \$30,000,000 or the equivalent of 60 cents per person in the United Kingdom.

Of the total United States crop of 446 million bushels, 128 million bushels or 29 percent have been purchased by the United States Government. The Commodity Credit Corporation purchased them at an average cost of \$1.50 per bushel and resold them for about 10 cents per bushel. The net cost to the Government (excluding transportation and storage) was roughly \$180,000,000 or the equivalent of about \$1.25 per person.

While the United Kingdom produced and consumed in 1948 approximately the same total quantity of potatoes as the United States, it has only about one-third as many people. Thus per capita consumption in the United Kingdom was about 3 times the level of the United States. Normal requirements for seed and stock feed and the estimated 1948 shrinkage and waste in the United Kingdom are somewhat higher than in the United States. This in part accounts for the smaller purchases of surplus by the United Kingdom Government.

The large volume of production and consumption in the United Kingdom in 1948 is considerably above normal. The increase was occasioned by war and postwar shortages of other food and by deliberate planning on the part of the Government to help ease the general food shortage by increasing the domestic production and use of potatoes.

The program seems to have had the support of the British people. A British publication, The Farmers Weekly for May 13, 1949 printed the following:

"The success of the operation..... can be judged by the fact that when the earlies are lifted, it is likely that there will be few tons of last year's yield of over 10,000,000 tons left to go to waste.

"The psychological effect of the Potato Division's achievement has been invaluable. Throughout the winter when it appeared to most farmers that hundreds of thousands of tons of potatoes would be left to rot on their farms there was a slow demand for seed for this year's planting. Although the price was guaranteed the majority felt their energy and that of their men had been wasted.

"It looked at one time as though the Government's target of 1,400,000 acres (for 1949 seedings) would be but a dream. Then, in February, there was a sharpening interest in seed purchases, and today Government departments appear satisfied that an adequate acreage has been planted."

(For information on potato surpluses in Sweden, the Netherlands and France see Foreign Crops and Markets May 16, 1949.)

BRITISH FRUIT CROPS SMALLER THAN LAST YEAR

The first official record of fruit production for 1948 in the United Kingdom places the apple crop at 19.9 million bushels for dessert and cooking and 3.0 million for cider. The 1948 crop of dessert and cooking apples is 31 percent lower than the 1947 crop of 28.9 million but 88 percent above the prewar (1935-39) average of 10.6 million. The cider apple crop is also lower than the 5.0 million bushels produced in 1947 and is 11 percent below the prewar average of 3.4 million.

The pear crop, (dessert and cooking) estimated at 1.4 million bushels compares with 1.7 million for 1947 and the prewar average of .8 million bushels. Pears, for cider, are indicated to be 99,000 bushels, compared with 332,000 for 1947 and 237,000 prewar. Cherries are estimated at 26,880 tons, 11 percent below the 1947 crop of 30,128 and nearly double the prewar average of 12,667 tons. Plum production estimated at 174,000 tons is 7 percent above the 1947 crop of 162,000 and 83 percent above the 5-year average of 95,000 tons.

LIVESTOCK AND ANIMAL PRODUCTSU.K. INCREASES FEED RATIONS FOR
COMMERCIAL PIG PRODUCTION 1/

The British Minister of Agriculture, the latter part of May, announced an increase of about 50 percent in the amount of rationed feedstuffs for commercial pig production in England, Scotland and Wales. It is indicated that separate arrangements will be made for Northern Ireland.

A major part of the additional feed allowance will be distributed on the basis of slaughter pigs sold to the Ministry of Food for the 4 months preceding September 1, the effective date of the new rations. With the so-called "bonus ration," the current feed ration will be tripled. Consequently, the present rate of 1 cwt. (112 pounds) of feed to every 160 pounds, dressed weight, of pig meat delivered to slaughter houses and bacon factories, will be increased to 3 cwt. (336 pounds) per 160 pounds of pig meat.

Basic feed rations are now predicated upon 20 percent of the 1939 numbers, but beginning September 1 the rations will be increased and be based upon 22.5 percent of such numbers. Slightly improved rations will also be issued under the "extended scheme" of rationing which provides feed rations for those farmers who had no pigs in the base year of 1939 and who failed to qualify for basic rations. This plan provides for about half the usual requirements and is issued for a certain number of hogs varying with the size of the farm. The sow farrowing allowance will be increased from 8 cwt. (896 pounds) to 9 cwt. (1,008 pounds) per sow effective July 1.

Prospects of larger imports of feeds from the larger world supplies and the need for larger domestic bacon and pork supplies apparently were the principal factors in the decision to increase feed rations. At the same time farmers are urged to grow as much feedstuffs as possible for their own hogs.

1/ Based on a report by Paul O. Nyhus, Agricultural Attache, American Embassy, London.

